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ABSTRACT

This teacher's guide reviews the literature on grade retention and promotion to help teachers make decisions concerning students in the primary grades. A brief introduction provides a statement of the problem; outlines the purpose, organization, and limitations of the study; and presents a glossary. Annotated citations for 34 studies are subsequently offered, and findings are summarized. The research was found to be inconclusive as to advantages or disadvantages of nonpromotion; however, cautions are issued against indiscriminate retention. Recommendations are made for selective retention, pupil identification, and retention decision procedures. (RH)

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NONPROMOTION OF PRIMARY GRADE STUDENTS
-A TEACHER'S GUIDE-

by

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INTRODUCTION

In recent years much attention has been given to the educational systems of America. The attention has come in the forms of criticism, opinion, suggestion and demand. Among the many academic issues that have been raised is the issue of grade level retention. Due to a perceived decline in basic academic skills, many groups have been demanding higher standards of achievement (Lehr 1982). Drawing upon his experience with Educational Testing Service, Ebel (1980) stated that schools without failure have failed and consequently, have lost the confidence and respect of pupils, educators, and the public. The National Commission of Excellence in Education (1983) recommended a review of promotion policies and suggested that promotion be guided by academic progress. Seventy-five percent of survey respondents in a 1983 Gallup Poll favored promotion based on academic progress and not on "social promotion." It appears that there is strong sentiment in favor of promotion based solely on achievement criteria; however, Lieberman (1980) stated that it was difficult for the concerned educator to make a retention decision entirely on statistical evidence.

STATEMENT OF THE PROBLEM

Teachers are charged with the responsibility, as expressed by Chansky (1964), "whether a child would be better adjusted academically by remaining in a grade or by advancing to the next grade with his class (226)." When consideration is given to the retention of a pupil, the teacher must face many issues and must bear a heavy burden. There exists a need for guidelines to aid teachers in making retention decisions.

PURPOSE OF THE STUDY

Lehr (1982) presented the necessity of educators being familiar with the research on retention. Being sensitive to this, a search of the literature was undertaken with the expectation that in addition to academic progress, there would be other factors needing consideration when making a retention decision. It was hoped that the research would lead to a retention plan that would take the individual pupil into account. Ultimately the purpose of the study was to establish guidelines that would be consistent with what was known in the retention literature.

ORGANIZATION OF THE STUDY

For the purpose of developing guidelines to aid teachers in making retention decisions, an analysis of positions and research was necessary. The study looked at the retention/promotion issue from a historical perspective and reviewed relevant research on the effects of retention. Additionally, the literature was studied to identify what factors led to a successful retention. Finally, utilizing what had been learned, decision making guidelines for the primary grade teacher were established.

Each of the resources studied, addressed a variety of themes. The annotated bibliography was ordered alphabetically to prevent restrictions on the subject matter contained within each article. Research with a scientific basis and anecdotal accounts were utilized to develop the retention position.

LIMITATION OF THE STUDY

It was not the intention of this study to settle the argument of retention vs. social promotion, but rather to provide background and guidelines to educators who do include consideration of retention in pupil evaluation. No attempt was made to provide solutions to the circumstances that may prompt a retention decision. The focus was limited to pupils in the primary grades.

GLOSSARY

attention span -- "the period of time in which a student can concentrate on a specific learning task." (Good 49)

chronological age -- "the number of years a person has lived." (American Heritage 272)

elementary education -- "the period of formal education beginning in childhood, usually at the age of 5 to 7 years, and ending approximately with adolescence." (Good 209)

grade, primary -- "any one of the first three grades of an elementary school." (Good 263)

immaturity -- "the state of growing and maturing at a slower rate...; both mental and physical growth may be influenced in this way." (Good 292)

intelligence, average -- "the mean or median of the population in general on a measure of brightness or mental maturity (an IQ of 100)." (Good 309)

maturity, social -- "the degree to which an individual has acquired the social and socialized behaviors that are usual and expected for his age or for his age and status." (Good 355)

mental age -- "the level of intellectual development expressed as equivalent to the chronological age at which the average child attains that level." (Good 20)

nonpromotion -- "failure of a pupil to be promoted to the next higher grade at a regular promotion period." Syn. retention. (Good 387)

primary education -- "that division of the elementary school including grades 1 to 3." (Good 436)

promotion -- "the act of shifting a pupil's placement from a lower to a higher grade." (Good 453)

promotion, continuous -- "a theory or practice of school promotion according to which all pupils are advanced on the basis of chronological age." Syn. automatic promotion. (Good 453)

promotion policy -- "the plan followed by a school for the promotion and placement of children." (Good 453)

pupil -- "one who attends a kindergarten or a school of elementary level." Syn. student. (Good 461.

self-concept -- "the individual's perception of himself as a person, which include his abilities, appearance, performance in his job (school) and other phases of daily living." (Good 524)

ANNOTATIONS

Ames, Louise Bates, "Retention in Grade Can Be a Step Forward." Early Years, December, 1980, 11:10-11.

The value of this brief article was that it supported the need of parental cooperation in a retention decision. As Associate Director of the Gesell Institute of Human Development, Ames tried to reassure parents that there was no need for children to be emotionally damaged by repeating a year in school. Feelings of failure on the part of the parents or repeating child could be hopefully eliminated by an understanding of the necessity of emotional and physical readiness for learning. It was suggested that parents must be convinced that retention would be for the child's benefit, and that the parents relay the news in a calm, non-blaming manner. Ames impressed upon the parent their role in aiding a child through a fruitful retention.

Ames, Louise Bates, Is Your Child in the Wrong Grade? New York: Harper and Row Publishers, 1966.

Ames' contention was that behavior age should be the basis for determining school readiness and subsequent promotions. Stating an absence of definitive research, she rejected the claim that grade repetition caused emotional damage. Attitudes of parents and school personnel affected the student's reactions. At the Gesell Institute, immaturity was found to be the main cause of school behavior problems. In the absence of developmental testing, which was the desirable procedure, Ames offered observational criteria for determining over placement. (1) What is the child's attitude toward school? (2) Does the child complete written work? (3) Are the academic marks less than his capabilities suggest? (4) Does the child have trouble socially? (5) Are friends from a younger age group? (6) Does the child act "babyish"? (7) Does the child have difficulties waiting his turn or refraining from bothering others? (8) Is the child inattentive during the school work time?

Baener, Nancy and Holley, Freda, Retention and Promotion Study, 1981-82. Final Technical Report, Educational Resources Information Center, ED 228 252, Office of Research and Evaluation Austin Independent School District, Austin, Texas, June, 1982.

The 1981-82 report of the retention program for the Austin Independent School District showed that retainees gained an average of .8 grade equivalents in reading on the Iowa Tests of Basic Skills. After retention the retainees' scores were nearer to their classmates' scores than similar nonretainees were to their classmates. The retainees were .33 below their classmates compared to the .77 grade equivalent years the nonretainees were behind their classmates. The results suggested that retention be selective. It was found that the lowest achievers in math and reading were most likely to benefit, since that group had the biggest gains between pretest and post-test. Retention, viewed as a "catch-up" opportunity for first graders offered the best hopes for achievement gains. Case studies were made to identify factors that led to academic improvement for retainees. Identifying the source of the learning problem and developing a plan of remediation was deemed necessary. A teaching style that conveyed an interest and willingness to do whatever was needed to improve achievement, resulted in a successful retention.

Bocks, William, "Non-Promotion: A Year to Grow?" Educational Leadership, February, 1977, 34:379-83.

After summarizing the research on nonpromotion, Bocks reached five conclusions. (1) Pupils appeared to achieve no better the second year than during the first year. (2) Nonpromotion did not guarantee mastery of the subject matter. (3) Threat of nonpromotion was not a motivating force. (4) There were harmful, social consequences for the nonpromoted child. (5) Social promotion did not appear to make a difference on the range of abilities in the higher grades. The studies cited by Bocks covered a time from 1911 to 1956.

Brown, Ernest L., "Retention: The Team Approach." The Clearing House, April, 1981, 54:348-49.

Dr. Brown pointed out that there was no problem-free method of handling the issue of pupil retention. Steps could be taken that lessened opposition and that brought the parents and school personnel into a working relationship to benefit the child. (1) Parents would be told of a child's academic difficulties as soon as the problem was recognized. (2) Through use of test interpretations and the school's reporting system, careful documentation and reporting of the pupil's progress would be made. (3) The school would keep a written record of the steps taken to assist the pupil. (4) A record of all contact between parents and the school personnel would be kept. The procedure outlined offered a time guide beginning within the first two months of school. Contact was to be on-going with the final recommendation during the final month of school. With the ongoing consultation, parents acquired a sense of concern about their child which inclined them to cooperate with the school personnel.

Chansky, Norman, "Progress of Promoted and Repeating Grade I Failures." The Journal of Experimental Education, Spring, 1964, 32:226-35.

Chansky studied the effects of nonpromotion on sixty-three Grade I low achievers, of whom thirty were advanced to Grade II and thirty-three repeated Grade I. The Stanford-Binet Scale of Intelligence, the California Test of Personality and the California Achievement Test were administered at the end of the first school year and nine months later. At the outset, the promoted group had higher mental ages and were more skilled in reading and in math fundamentals. No differences were observed in the amount of achievement relative to ability. Both groups were rated as maladjusted. During the study both groups demonstrated gains in academic achievement; however, the promoted group made a half year greater gain in vocabulary and reading comprehension ($p<.05$). Achievement relative to mental age was lower for the promoted group than for the nonpromoted group. Chansky noted that the extra year in Grade I gave the students the opportunity to function on a level that was consistent with their mental abilities. Improvement in personality traits was correlated with chronological age and not group membership.

Chase, Joan A., "Study of the Impact of Grade Retention on Primary School Children." Journal of Psychology, 1968, 70:169-77.

Sixty-five first, second and third grade repeaters, who were judged as immature for their grade but considered of average intelligence, were selected for this study. After six months in the repeating grade, performance on the Bender Visual-Motor Gestalt test was nine months below age-mates' performance but 1.8 months better than the performance of their classmates. Teachers rated retention as meeting the child's needs in seventy-five percent of the cases, and only six percent of the children were noted to be seriously upset by retention. Parent questionnaires reflected very little negative effects and considerable positive changes following retention. First graders particularly were better able to compete with classmates than were those who were not retained until second or third grade.

Cunningham, William and Owen, Ray C., "Social Promotion: Problem or Solution?" National Association of Secondary-School Principals. Bulletin, October, 1976, 60:25-29.

The authors looked at the Greenville County School System of Virginia as an attempt to devise new educational systems to handle the problem of pupils lacking fundamental skills. Grade placement in the schools was based on the pupil's achievement level, which was determined by teacher assessment, grade reports and standarized test results. Further grouping was done by age, so retained pupils remained with age peers. Partial promotions were used whenever possible and files were kept on a pupil's curriculum exposure to avoid repetition of material. At the secondary level an alternative to the strictly academic diploma was offered in a program that provided job-entry skills. The Greenville Plan attempted "to combine the best features of the traditional with a system using promotion by achievement." (27) The authors referred to this as a middle-ground answer to the promotion vs. nonpromotion controversy.

Curry, Mildred, "Held Back in Kindergarten," Early Years, December, 1982, 13:P3,P27.

Suggesting maturity as the only legitimate reason for requiring a second year of kindergarten, Curry presented observable symptoms of immaturity. The immature child (1) was easily distractable; (2) had a short attention span; (3) lacked muscle control (large and/or small muscles); (4) lagged in social development; (5) exhibited poor visual-motor coordination. When faced with a child's retention, it was suggested that the family provide experiences that promote warm relationships. Parents should provide for eye, hearing and physical examinations. Growth takes time, and Curry warned that pushing by an over-anxious parent may actually impede progress.

Donofrio, Anthony F., "Grade Repetition: Therapy of Choice." Journal of Learning Disabilities, June/July, 1977, 10:349-51.

Donofrio suggested the repetition of one or two grades, kindergarten and first grade, for specifically identified children. When one or more of the factors, and learning disabilities entered into a child's diagnosis, the child would be best served by "making time," in order to mature to the level of peers. The factors identified by Donofrio included maleness, birthdate (summer to fall dates), maturation rate, verbal facility, I Q (80s and low 90s), and th presence of hyperkinesis. Hyperkinesis, although treated often by medication, was often accompanied by a maturational lag. In the absence of psychological screening of readiness, the kindergarten teacher's opinion was the best for decision making.

Ebel, Robert L., "The Failure of Schools Without Failure." Phi Delta Kappan, February, 1980, 61:386-91.

Ebel maintained that schools which developed a no-failure policy had allowed a tolerance for lack of learning. He presented three arguments for a change in this policy. (1) Without the possibility of failure, success in learning had lost its meaning. (2) With pupil achievement affected by many factors, learning failures could not be eliminated. (3) Failure could teach and motivate. Ebel's argument developed that schools must provide an environment which stimulates and facilitates learning. Included in this environment would be capable teachers with an enthusiasm for teaching; plentiful books and materials; the recognition and rewarding of achievement; and the example of successful learners. However, schools also needed to maintain their credibility by recognizing and reporting failure when it occurred.

Elligett, Jane, and Tocco, Thomas, "The Promotion/ Retention Policy of Pinellas County, Florida." Phi Delta Kappan, June, 1983, 64(10):733-35.

Looking at the effects of a specific promotion/ retention policy after a five year implementation, the authors noted an increase in test scores during the year of grade retention and importantly, during the year following the repeated year. Also of importance was found to be a decrease in grade-equivalent deficits. The policy set uniform criteria for promotion and retention of elementary and middle school students. Minimum criteria was set at test score deficits of a ½ year at Grade 1 and ranging to 1½ years at Grade 5. Each student's placement was determined after the total school profile was considered and not solely on the test results. Considering the unreliable nature of Grade 1 test scores, more importance was given to pupil achievement within the school's reading-language arts system. The policy gained acceptance because of three factors: (1) retention was presented as an opportunity for academic growth; (2) retention became less of an exception, eliminating any stigma; and (3) early notification was given to the parents. The stated purpose of the retention policy was to prepare students for achievement in the following grade. Follow-up testing bore this out.

Finlayson, Harry J., "Nonpromotion and Self-Concept Development." Phi Delta Kappan, November, 1977, 59:205-06.

Finlayson conducted a two year study of primary grade pupils to explore the effect retention in first grade would have upon the self-concept of the pupil. After the first year the sample group of 585 pupils was divided into three defined groups: promoted, borderline, and nonpromoted, with twenty-five pupils in each group. The FACES Scale, to measure self-concept, was administered four times during the study. The self-concept scores of the nonpromoted group showed significant increase during the second year as compared to the first year. By the fourth administration, the mean of the nonpromoted group (15.16) and the mean of the promoted group (15.20) were nearly identical. Supplementing the data from the FACES Scale were parent and teacher questionares. Teachers viewed the nonpromoted pupils as remaining stable or becoming more positive in their self-concepts in 96 percent of the cases. Parents believed their nonpromoted child to be more confident during the repeated year in 79.2 percent of the reports. Finlayson concluded that nonpromotion did not appear to have negative effects upon the self-concepts of the studied primary grade pupils. Nonpromotion would be a valid option for educators.

Frank, Charlotte, "Equity for All Students: The New York City Promotional Gates Program." Educational Leadership, May, 1984, 41(8):62-65.

Frank's report was made to inform educators of her experiences with student retention policies. The Promotional Gates Program began in September, 1981, as a response to statistics showing 43 percent of elementary students reading at grade level, but 93 percent were being promoted. The Gates Program identified the most educationally needy students and made their education a top priority. The author reported that by the second year of the program 73 percent of the seventh grade students were meeting criteria. In five years, 1978-83, fifty-four percent of the students were reading at grade level. Forty-two percent of the students who began the 1982-83 year more than two years below criteria, closed the gap after one year in the program. Furthermore, students promoted after one year in the Gates program maintained progress. By providing smaller classes, explemplary curriculum, specifically trained teachers, on-going assessment and modification of the program, the Gates Program proved to be an effective strategy for improving learning and teaching.

Goodlad, John I., "Research and Theory Regarding Promotion and Nonpromotion." Elementary School Journal, November, 1952, 53:150-55.

After studying the available research and conducting his own research, Goodlad concluded that "blanket promotion policies are not justified." (154) However, a pattern in the research did become apparent that supported promotion over nonpromotion. Nonpromoted children experienced more unsatisfactory progress and poorer adjustment than did slow-learners who had been promoted. Three recommendations were made by Goodlad: (1) consider each child individually and where doubt exists, choose promotion; (2) make use of a broad base of factual information gathered throughout the school year; (3) give attention to the instructional needs of the pupil and examine the cause of failure.

Hagen, Janice, "I Kept 8 Students Back...and I'm Still Alive to Tell About It." Teacher, August, 1980, 98:47-49.

As a fourth grade teacher in the Denver Schools, Hagen reported on her decision to retain students who were functioning below grade level as measured on the Comprehensive Test of Basic Skills. The preliminary decision was made early in the school year. Careful planning was taken by the teacher: charting of test results, weekly academic reports to parents, individualized instruction with reference to grade level expectations, multiple parent conferences and careful examination of the April CTBS results. During the repeat year, Hagen reported expressions of confidence and success by the retained students. The students' maturity levels were observed to be more matched to the new fourth graders. Acceptance by classmates resulted from the teacher's attitude, "...a student's placement depends on where he or she can work and learn best." (49)

Hallenbeck, Margaret, "Considerations for Retention in the Elementary Grades." Kappa Delta Pi Record, February, 1981, 17(3):66-69.

Recognizing that children learn and mature at different rates, Hallenbeck, a teacher for twenty-five years, viewed retention as a decision to be made for some children. In order to lessen negative feelings, six guidelines were offered. (1) Gain the support of the parents before discussing the decision with the pupil. (2) Present retention as a positive step. (3) Give no guarantee that the child will score higher the next year. (4) Discuss the decision with the child in a relaxed, friendly manner. (5) Give the child the choice of remaining with same teacher. (6) Inform all concerned of the child's progress as the grade is repeated.

Holmes, C.Thomas, "The Fourth R: Retention." Journal of Research and Development in Education, Fall, 1983, 17(1):1-6.

With the rate of retention on the increase, Holmes decided to reexamine the effect retention had on academic achievement in basic skills. Studies chosen for the meta-analysis were those that matched retained pupils with control pupils on the basis of achievement test scores, and those that presented results of original research on the effects of retention in reading, math, and language arts. From the data obtained from seven studies, the retained pupils scored on the average of .46 standard deviation units lower than the promoted pupils in reading achievement. The gap seemed to narrow in later years. In measuring the effects on math achievement by use of six studies, the retained pupils scored .45 standard deviation units below the promoted pupils. Several years after the retention, differences between the two groups narrowed, but the nonpromoted group continued to score lower. Five studies were used to calculate the effects of retention on language arts achievement. The promoted group outscored the retained pupils by .36 standard deviation units, and as with the other analyses, the difference in achievement appeared to narrow in succeeding years. Holmes concluded that the research did not support the practice of retention; that it, in fact, suggested the retained students fell behind and spent their academic life attempting to catch up.

Horn, Becky, "Retention is Not a Dirty Word." Instructor, August/September, 1976, 86:32-34.

A minisurvey of primary teachers, who had retained pupils for reasons of immaturity, revealed that the teachers supported retention; estimated 80 percent of the retainees were helped; and indicated the pupils developed better self-concepts. A pupil survey reported that the pupils indicated positive self-concepts and judged their progress to be as well or better than before retention. A child requiring retention was to received it in the early grades. The decision had to be deemed appropriate and supported by the parents, teacher, and principal. Horn suggested that the classroom teacher's behavior follow certain guidelines. (1) Retention would not be used as a threat nor referred to in the classroom. (2) Individual attention would be given to insure that the second year was not a repetition of the first. (3) The pupil would be placed with a different teacher during the second year and the child's progress would be monitored for quick detection and correction of problems.

Jackson, Gregg, "The Research Evidence on the Effects of Grade Retention." Review of Educational Research, Fall, 1975, 45(4):613-35.

Jackson's review of forty-four studies showed that most research on the subject was inadequate for making valid inferences about the effects of grade retention. His expressed purpose for the review was to determine whether students doing poor academic work or who exhibited emotional or social maladjustment in school would benefit more from grade retention than from being promoted. In Design Type I, students retained were compared with matched characteristic students who were promoted. Even with the matching there existed no assurances that the comparisons were made among students experiencing similar difficulties, resulting in a promoted group bias. Design Type II studies compared the condition of retained students after promotion with their condition prior to promotion. The bias was toward retention benefits. Type III studies experimentally assigned pupils who were experiencing difficulties to either promotion or grade retention. This offered the most reliable test of effects, however, three studies were not an adequate base for making generalizations. Jackson called for further quality research before conclusions could be made as to the benefits of retention or promotion.

Jones, Larry, and Sutherland, Harry, "Academic Redshirting: A Positive Approach to Grade Retention." Education, Winter, 1981, 102(2):173-75.

Jones and Sutherland offered a retention model based on the athletic process of "redshirting." This was an attempt to redirect the negative view of repeating to one that emphasized benefits and potential for change. The redshirting plan relied heavily on the media to explain and sell the program. Intensive inservice training with an emphasis on positive vocabulary and positive aspects of retention was required. The program established "eligibility" requirements, spotlighted famous athletic and academic "redshirts", and highlighted the achievements of students enrolled in the program. With this orientation, the authors suggested that the retention would affect self-concepts in a positive manner.

Kerzner, R.L., The Effects of Retention on Achievement. Educational Resources Information Center, ED 216 309, Master's Thesis, Kean College of New Jersey, Union, new Jersey, 1982.

Kerzner's study focused on students, grades one through five, who had repeated a grade level due to academic reasons and were one grade level beyond the repeat year. Using the Comprehensive Test of Basic Skills, the results of pre- and post-testing were charted by means, standard deviations, and T-scores. Grades one, two and three showed T-score gains significant at $p<.01$. The T-scores for grades four and five had no significant gain. Comparing test results of the retained year and years following, a decline in mean scores after two and three years occurred for grade one repeaters. Grades two and three experienced both increased and decreased achievement scores in the following years. Kerzner's results suggested retention for slow and remedial learners in grades one, two and three. Chances for success were implied with early retention.

Lehr, Fran, "Grade Repetition vs. Social Promotion." Reading Teacher, November, 1982, 36(2):234-37.

As pressures were placed on educators to adopt strict performance standards, Lehr strongly urged that the research be studied. "Grade Repetition vs. Social Promotion" presented a historical perspective of retention and reported various research findings. Findings that were supportive (Finlayson, Ranick and Owen, Sandoval and Hughes, and Mc Affee), and those that were critical of retention were summarized in this article (Bocks, Reiter, and Bossing and Brien). In establishing or changing policies of retention, Lehr recommended that decisions be based on the benefits to the child, not as an answer to public criticism.

Lieberman, Laurence, "A Decision-Making Model for In-Grade Retention." Journal of Learning Disabilities, May, 1980, 13(5):268-72.

This decision-making model was an attempt at rational problem solving of retention decisions. Warning against decisions based solely on statistical evidence, Dr. Lieberman proposed an in-depth analysis of all the factors in each case of retention. Since each pupil would be considered on an individual basis, the stated factors were not weighted. Child Factors included physical size, age, academic potential and competencies, psychosocial and neurological maturity, self-concept, independent functioning, and attitude. The Family Factors dealt with transience, siblings, and attitudes toward retention. School Factors emphasized the attitude of the system, principal, and teachers toward retention and the availability of personnel services, and optional programs. The factors indicated that criteria would be for retention, against, undecided, or not applicable. For the teacher in conflict over the advantages and disadvantages of retention for an individaul pupil, this model would be of assistance.

Light, H. Wayne, Light's Retention Scale and Recording Form. Educational Resources Information Center, ED 191 897, Academic Therapy Publications, Novato, California, 1977.

Light emphasized that the Retention Scale was not a test but a counseling tool which would be useful during parent-teacher conferences. The Scale consists of 19 categories: school attendance, intelligence, level of achievement, physical size, age, sex of student, sibling relationships, previous retention, existence of learning disabilities, motivation to complete tasks, delinquency behaviors, command of English language, present grade, transience, emotional problems, experiential background, and immature behavior. Each category was scored from a zero, which would favor retention to a five, which indicated a liability for a successful retention. It was recommended that no child receiving a single "5" be retained. A low total sum (0-9) suggested retention for the student, while a high total (72-92) suggested no retention. The scale should be used in conjunction with the professional judgment of the teacher.

Lindvig, Elise, "Grade Retention: Evolving Expectations and Individual Differences." The Clearing House, February, 1980, 56(6):253-56.

After consideration of past practices and research, Lindvig suggested that attitudes toward individual learning problems have changed. With retention viewed as an opportunity and not a defeat, attention was given to factors that led to successful retention. The nature of the student's problem needed to be identified, with thought given to the age, maturity and social adjustment of the child. Early identification of retention need was recommended, with special attention to the kindergarten and first grade years. Parents were to be informed in advance, and communication was to be maintained with teacher documentation and comparisons with grade level expectations. Influencing a child's acceptance or retention were the attitudes of the parents, and the child's understanding of the reasons for retention. An understanding of the fact that children learn differently and at different rates was the suggested message for the child.

Lobdell, Lawrence, "Results of a Nonpromotion Policy in One School District." Elementary School Journal, February, 1954, 54:333-37.

Lobdell urged careful selection and definite criteria in pupil nonpromotion decisions. This was found to lead to success during and after the year of retention. The criteria were divided into two categories. General criteria were broad and served as a framework: (1) the long-range welfare of the child was to be addressed; (2) only one grade was to be repeated; (3) retention in Grade VI was avoided; (4) pupils were placed with different teachers during the repeating year. The specific criteria were used to judge the individual pupil: (1) teacher assessment of the pupil's work; (2) pupil's scores on standardized achievement tests; (3) pupil's scores on mental ability tests; (4) social, emotional and personality characterisitics; (5) pupil's chronological age and size; (6) parental attitude toward school work. Use of this screening process resulted in 69 percent of the nonpromoted pupils in Lobdell's study to have made good or fair progress.

Owen, Samuel and Ranick, Deborah, "The Greenville Program: A Commonsense Approach to Basics." Phi Delta Kappan, March, 1977, 58:531-33.

The Greenville County (Virginia) schools held the belief that grades should reflect achievement, that promotions should be based on mastery of skills, as measured on the SRA Achievement Tests, and that a diploma should represent academic accomplishment rather that attendance. To establish an achievement-based retention program, the district found the following to be necessary. (1) The school board had to develop a policy that led to student achievement. (2) Teachers had to base evaluation on student achievement and had to plan instruction accordingly. (3) Evaluation had to be uniform and fair for all students. (4) Students had to be aware that promotion was based on achievement. (5) Parents needed to accept the importance and necessity of skill mastery. Owen and Ranick reported that the results of the two year program showed (1) the number of retained students had declined; (2) test scores had risen; (3) dropout rates had fallen; (4) teachers and students expressed satisfaction; (5) graduates demonstrated a mastery of skills.

Reinherz, Helen and Griffin, Carol Lee, "The Second Time Around." The School Counselor, January, 1970, 17:213-18.

Reinherz and Griffin studied fifty-seven boys of normal intelligence and representative of the city's socio-economic groupings, who had repeated in the first three grades of school. Maturity level and grade of retention emerged as the significant characteristics of the successful repeaters. A large proportion of the students classified as immature, made "satisfactory achievement" as compared with a more mature group ($p<.05$). The association between repeating grade and satisfactory achievement (84 percent for first graders) was significant ($p<.05$). Parental attitudes tended to become less positive toward the retention experience beyond first grade. Age at school entry was not a significant factor. Children rated as having good social emotional adjustments and good peer relations made the most progress ($p<.05$). Involvement with special programs or guidance had a negative association to academic progress ($p<.05$). Familial patterns of retention emerged in the study, and the father's level of education was found to be lower than the males of the general population.

Reiter, Robert, The Promotion/Retention Dilemma: What Research Tells Us. Educational Resources Information Center ED 099 412, Office of Research and Evaluation, Philadelphia School District, Report No. 7416, Philadelphia, Pennsylvania, December, 1973.

Reiter's balanced discussion of the promotion/retention dilemma led to the conclusion that strict adherence to either policy was not desirable. Each policy contained negatives, but in terms of effects upon the pupils, automatic promotion was found less unsatisfactory than automatic retention. More crucial than the specific policy was the atmosphere in which the pupil was either retained or promoted. Reiter recommended maintaining close communication between home and school; a different teacher for the repeating year; decisions made on an individual basis; constructive attitudes toward the retention by teachers, parents, and child; and recognition of the value of each child. A policy favoring promotion but allowing for "purposeful retention in the primary grades"(16) was advanced by the author.

Sandoval, Jonathan and Hughes, Penee, Success in Nonpromoted First Grade Children, Final Report. Educational Resources Information Center, ED 212 371, University of California, Davis, California, June, 1981.

In the spring of 1979, 146 first grade children were identified as candidates for retention, with seventy-eight ultimately being retained. The results of this research pointed to initial status in three important areas as the best predictors of retention success: academic skills, emotional development, and social skills. The successful repeaters, 38 percent in this study, were found to have some academic skills, average IQs, parents involved in the schools, positive attitudes about retention, good self-concepts, and adequate social skills. There was a reported positive interaction between the child and the teacher. An interesting predictor emerged from the study; the extent of the teacher's confidence in the retention decision. This was true for academic as well as emotional growth. A possible conclusion was that a child be retained only if the teacher was confident the child would be helped by repeating.

Scott, Betty and Ames, Louise Bates, "Improved Academic, Personal, and Social Adjustment in Selected Primary-School Repeaters." The Elementary School Journal, May, 1969, 69:431-39.

This research reviewed the records of twenty-seven pupils, ages five to twelve, who had repeated a grade because of immaturity. Immaturity was determined by either a behavior examination or teacher/principal judgment. Excluded were children below 90 IQ, brain damaged, or emotionally disturbed. The students' grades for June, 1966 were compared to the mid-year grades of the 1966-67 (the repeat year) school year. Every student showed gains with none below a C average. Teachers rated all children on a five point scale for ten questions on school adjustment. The adjustment for 90 percent of the pupils was rated high or very high. Parents compared their child's adjustments for the 1965-66 school year with repeating year. Significant improvement resulted in seven of the nine behavior items. Greatest improvement came in the area of self-responsibility. This study suggested that grade repetition for immature reasons had a beneficial effect on grades, school behavior and home behavior.

Stringer, Lorene, "Report on a Retentions Program." The Elementary School Journal, April, 1960, 60(7):370-75.

Stringer reported on a five year, non-controlled study of fifty retention cases, grades one through eight. Changes in academic performance were measured by differences in median scores on the Stanford Achievement Test. No attempt was made to control learning-problem variables. Achievement made greatest gains during the retention year with some slackening the year following. Two factors emerged as predictors of successful retention: a lag between 1.0 and 1.9 grades below placement and a progress rate less than 50 percent of normal. Parental attitude and involvement seemed to be the key in the cases fitting the above criteria, who had received social promotion. Parental effort resulted in solid achievement gains; however progress declined the second year. It was suggested that the fall-off may have resulted from relaxed parental effort after the initial surge of success.

Thompson, Sydney, Grade Retention and Social Promotion. Educational Resources Information Center ED 189 681, ACSA School Management Digest, No. 20, Burlingame, California, 1980.

Thompson claimed the demands for strict promotional standards and accountability were political reactions and educationally unsound. To substantiate his claims, the literature was searched and was found to favor social promotion over retention. Additionally, it was concluded that retention did not ensure achievement; was not a a motivating force; worsened personal-social adjustment; and incurred long term damage. Strict retention policies were not supported by the research; however, some research did suggest retention for immaturity reasons. The policy of the Eugene, Oregon school system preferred continuous promotion. Deviation occurred only when retention was best for the individual needs of a student; cases of developmental immaturity and prolonged absence. Retention was to occur at the earliest possible grade. Retention to correct academic difficulties was opposed. In such cases, the system made curriculum adaptations. Thompson called for increased individualization and continuous progress curriculum.

SUMMARY

Current practices of promotion and nonpromotion have not always existed in American public education. Thompson's historical overview (1980) brought out the fact that prior to the graded schools of the mid-nineteenth century, student progress was of an individual nature, and the educational level of the student was determined by the number of books completed. The graded school was an attempt to standardize education for large numbers, with pupils divided according to achievement and with no regard to individual differences (Thompson 1980). Thompson continued that a student did not progress until all subject matter was mastered, resulting in a high rate of failure. Ebel pointed out that promotion was not automatic and that in many grades, over-age students were to be found. High failure rates led to large numbers of student drop-outs (Lehr 1982). The economic situation of the 1930's depression caused a shift in educational practice. It became necessary to keep the children in school in order to reduce competition for the few existing jobs. Research of the time led to a questioning of rigid retention policies (Thompson 1980). Attention moved to the conditions of learning and to the individual needs and differences of the students (Ebel 1980). Social or automatic promotion became the standard and

continued until the demands for accountability in the 1980's led to a questioning of promotion standards.

Accountability and demands for improved achievement have led to programs of stricter promotional standards and to research on the effects of nonpromotion. In 1973 the Greenville County (Virginia) school system adopted a policy of promotion based on mastery of skills (Owens and Ranick 1977). Cunningham and Owens (1976) viewed this as a middle ground system: one which grouped students by age and by achievement, with sensitivities to alternative programs. Elligett and Tocco (1983) presented the promotion/retention policy in Pinellas County, Florida as one of balance. Decisions were made in accordance with set achievement scores, but consideration was given to the student's total school performance. The New York City Board of Education met the demands for stricter standards with the Promotional Gates Program, instituted in 1981 (Frank 1984).

With rates of retention on the rise, Jackson (1975) undertook an extensive review of research literature to answer the question whether low achieving students would benefit more from repeating a year than from being promoted. Jackson concluded that the research was too inadequate to make valid inferences about the effects of grade retention but warned that to retain was to do so

without evidence of benefits. Bocks (1977) found that a majority of studies between 1911 and 1956 revealed no benefits from retention. Holmes' research (1983) concurred with Bocks' findings and went on to suggest that retained students actually fell behind and spent their academic years attempting to catch up. Goodlad (1952) had observed a pattern in the research which associated unsatisfactory progress and poor adjustment with nonpromoted students. He concluded, however, that the evidence did not justify blanket promotion policies. Sandoval and Hughes (1981) suggested that past research had not clearly established the effects of nonpromotion upon academic achievement. Furthermore, they indicated a failure of the research to explain the nature of the negative influences. From their study of repeating first graders, Sandoval and Hughes urged careful selection of students for retention. Reporting on the retention policy of Austin Independent School District, Baener and Holley (1982), likewise, found benefits in selective retention. Due to the ambivalence of the findings, Reiter (1973) recommended no strict adherence to any one policy but offered a policy of automatic promotion which allowed for purposeful retention. The policy of the Eugene, Oregon, school system preferred continuous promotion with retention only when it was in the best interest of the individual student (Thompson 1980). The research

has shown a preference for promotion, but allowances for for selective retention have been stipulated.

Research, of what could be described as situations of selective retention, appeared to produce encouraging findings. Finlayson's (1977) study of primary grade pupils indicated that nonpromotion did not have negative effects upon pupil self-concepts and that nonpromotion would be a valid choice for educators. Primary grade pupils retained for immaturity were judged by Chase (1968) to have encountered no lasting ill effects and were in a position to compete academically with their classmates. Scott and Ames (1969) confirmed Chase's findings with a similar study of immature repeaters. Chansky's (1964) analysis of Grade I low achievers revealed that achievement relative to mental age was greater for the nonpromoted group than for the promoted. He noted that the extra year gave the pupils "the opportunity to function on a level consistent with their mental abilities" (230). A survey of primary teachers by Horn (1976) reported satisfactory results in retention cases. A questioning of parents by Ames (1981) reported that good effects outweighed the bad effects of retention. Lindvig (1983) implied that an attitude of viewing retention as an opportunity rather than as a defeat may have rendered a more receptive climate toward retention.

Several researchers have attempted to identify characteristics of successful retainees. Maturity level and grade of retention emerged as the significant characteristics in a study by Reinherz and Griffin (1970). Retention was supported for the immature student and for the student in first grade. Lobdell (1954) had identified immaturity as an indicator for retention. The Gesell Institute of Human Development ascertained immaturity as the main cause of school behavior problems and recommended behavior age as the basis for grade placement (Ames 1966). Kerzner's (1982) study suggested retention for the remedial or slow learner, and retention was judged most beneficial in the primary grades. Finlayson had noted "that pupils' self-concepts tend to become less positive as they mature in the primary grades" (206). Lindvig, Donofrio and Curry recommended early detection of retention cases with special attention to Kindergarten and Grade I.

Light (1977) and Lieberman (1980) gave consideration to chronological age of the pupil, as did Donofrio (1979). Specifically, students with birthdates in the summer to early fall were viewed as candidates for repeating. However, the research of Reinherz and Griffin (1970) found that age at school entry was not a significant factor. They suggested developmental age as the crucial component in the educational plan for the pupil.

The importance of achievement level prior to retention was shown to be a factor in some research. Stringer's (1960) study identified that an academic lag between .5 and 1.9 grades below placement was a predictor of successful retention. Furthermore, she found that a pre-retention progress rate of less than fifty percent of normal was an efficient predictor. Baener and Holley (1982) reported that the largest gains in achievement during retention were made by pupils below the thirtieth percentile. However, Sandoval and Hughes (1981) determined that academic growth during retention was predicted by the level of academic skills acquired prior to the retention. Retention was not recommended for students with extreme scores, who would better be served by programs of special education. In fact, Reinherz and Griffin (1970) pointed to a negative association between involvement in special education programs and academic progress. From the research it could be concluded that achievement rated as below average, but not retarded, predicted successful retention.

Parental attitude emerged as a factor in some research. The successful repeaters in the Sandoval and Hughes study were found to have parents who were involved with the schools, and who maintained positive attitudes about retention. Ames' experience (1981) supported the need for parental cooperation. Reinherz and Griffin observed that parental

attitude toward retention tended to become more negative for children in second or third grade as compared to first grade. The research has suggested that first grade pupils, identified for retention, were more likely to experience success when parents were supportive. Conversely, Stringer (1960) noted that parental effort resulted in solid achievement gains for low achievers who had been promoted.

The importance of the teacher's decision was confirmed in the Sandoval and Hughes study (1981). They discovered that the extent to which a teacher was confident in the decision to retain a pupil was an indicator of the retention being successful. Goodlad (1952) proposed the question: "Is nonpromotion likely to favor the all-round development of these children?" (154). If in doubt, Goodlad's advice was to promote to the next grade.

Consideration of the predictive factors guided some educators to formulate decision making models. With attention to child, school, and family factors, Lieberman's model (1980) was considered as a guide for the uncertain teacher. The model did not weight any one factor but suggested that the individual case would determine the factor's importance. Unlike the Lieberman model, Light's Retention Scale (1977) did assign numerical value to each factor. The scale was designed as a tool of communication between

teacher and parents and not as a psychometric test for retention. The two guides assist the educator in weighing often subjective issues in a manner that is consistent with what is known about retention. Lieberman warned against the making of a decision based solely on statistical evidence; rather an in-depth study of all factors was warranted.

It was incumbent upon the teacher to gather needed information from a broad base. Lobdell (1954) specified that teacher assessment include observations, comparisons, and scores on standardized achievement and mental ability tests, along with considerations of the social and emotional development of the pupil. This appeared to concur with Goodlad's recommendation (1952) of decision making supported by a broad base of factual information.

The suggestions of several educators certainly echoed Reiter's sentiment that the atmosphere in which a pupil was retained was more important than the issue of retention. The "academic redshirting" proposal of Jones and Sutherland (1981) offered a technique to achieve a favorable atmosphere. A pupil's reaction to retention, according to Ames (1981), depended greatly upon the parents' reactions. Educators were to convey a message of hope and opportunity. Hallenbeck (1981) enlisted the parents' cooperation before approaching the child and stressed the

necessity of their acceptance of retention as a positive step. Lindvig (1983) expressed a need for the pupil to understand the reasons and benefits of retention. Hallenbeck stressed that the pupil not think of himself/herself as a failure.

Data on any pupil in question should be communicated via multiple conferencing with the parents. Brown (1981) stipulated conferencing within the initial two months, and Hagen's strategy (1980) included weekly, written reports and intermittent conferencing. Along with the pupil's progress, all conferences were to be documented. A step-by-step log may be time consuming, but Brown viewed the effort as one which brought parents, pupils and school personnel into a cooperative relationship.

Vital to the retention decision was planning for the repeating year. Lieberman doubted that retention would succeed without provisions for curriculum modification and special services during the repeating year. Attention was given to the avoidance of mere repetition by the use of curriculum files in the Greenville program (Cunningham and Owens 1976). Baener and Holley (1982) recommended that the initial teacher pass all information to the next teacher. To avoid repetition, alternative subject matter and materials were suggested.

Generally, there was agreement as to the need for a different teacher during the repeating year (Lobdell, 1954 and Horn, 1976). Hallenbeck put the choice to the pupil. Recognizing that some pupils needed the security of a familiar situation and that some teachers had an understanding of the pupil's specific needs, Lieberman (1980) permitted placement with the same teacher.

One retention in a pupil's elementary schooling was considered sufficient. Only under most unusual circumstances did Lobdell and Lieberman make exceptions. Donofrio (1977) allowed for repetition of one or two grades, namely kindergarten and first grade. Placement depended upon the availability of personnel and services.

CONCLUSIONS

Promotional policies appeared to be subject to the educational and political climate of the times. The research was inconclusive as to the advantage or disadvantage of nonpromotion but cautioned against indiscriminate retention. However, even without definitive answers to Chansky's concern, nonpromotion was recommended for some identified pupils. Some school systems, in recent years, have been less inclined toward automatic promotion and have adopted policies of selective retention.

It was emphasized that the classroom teacher carry the responsibility of evaluation and utilize the total pupil profile in decision making. Research, which identified factors predictive of successful retention, aided the teacher in this endeavor. Use of these and of environmental guidelines would maximize benefits for the pupil.

Lastly, it was recognized that additional, longitudinal research was needed in the area of pupil promotion. This could lead to more definitive answers desired by those in the field of educational research.

RECOMMENDATIONS

It is recommended that:

1. Progress within the school be continuous but allowing for selective retention.
2. Retention be permitted for specifically identified pupils.
3. Pupil identification be based on the following considerations:
   a. Does the pupil behave in an immature manner? That is, short attention span; distractable; poor motor functionings; social development lag; and poor eye-hand coordination (Curry, 1982).
   b. Is the pupil in the primary grades of Kindergarten, Grade I, II, or III?
   c. Does the pupil have an achievement lag between .5 and 1.9 years below placement?
   d. Does the pupil have a perceived progress rate of less than fifty percent of normal?
   e. Has the pupil acquired some academic skills which indicate a capacity to learn within the regular curriculum?
   f. Is the pupil young for the grade placement; summer and early fall birthdate?
   g. Do the parents accept the retention as an opportunity?

h. Is the teacher certain of the decision?

4. Affirmative answers to the above questions would indicate a pupil in need of retention.

5. Retention decisions follow defined procedures:

   a. Identify pupils in possible need of retention by the ninth week of schooling.

   b. Communicate with the parents by means of written reports and conferencing at nine week intervals.

   c. Document all testing and communication.

   d. Base decisions on the total pupil profile and not on one criterion.

   e. Develop positive parental attitudes regarding retention as an opportunity for growth and learning.

   f. Relay the decision to the pupil in a reassuring manner, stressing the learning differences among pupils, emphasizing the benefits and attending to the feelings of the pupil.

   g. Provide for placement with a different teacher during the repeating year, unless circumstances of personnel or parental desire warrant otherwise.

h. Avoid mere repetition during the repeating year with adaptations in the curriculum and conferencing among teachers.

i. Avoid multiple retentions for a pupil.

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